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ABSTRACT

Policies for the provision of financial aid to elementary and secondary schools by national governments can be classified into four types: statist, in which no private education exists and only state schools are funded; separate, in which private education is privately funded and public education receives government support; supportive, in which both private and public education are fully government funded; and syncretic, in which private schools receive substantial but not full government funding. These categories were developed using taxonomic research methods involving data analysis, literature reviews, and instrument verification. Examples of countries falling into each category are provided. A short bibliography is included. (PGD)

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Private Schools and Government Finance: A Taxonomic Classification of Alternatives

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Different countries around the world finance and administer their schools according to a variety of recognizable alternatives. Analysis of abundant descriptive literature on school finance in a representative sample of countries yielded no written evidence that a system for classifying and comparing the world's educational funding systems exists. This study evolved from a quest to locate such a classification scheme. Its purpose shifted from identification to development of a method for comparing different education systems with respect to finance and organizational control. Specifically, we became interested in determining a clear and unambiguous way to classify national educational policies in terms of government financial aid provided to, or with-held from elementary and secondary schools.

This research may have implications for policy in the United States. Government aid to non-government schools appears to play a role in national policy issues at the present time. President Reagan has proposed federal tuition tax credits. Minnesota has found a constitutionally permissable method of claiming aid for school expenses to parents of both public and private school students.[1] Since the United States has had little experience with government aid to non-government schools, the policies of foreign governments and the experience of foreign societies would appear to be prime sources of empirical information.

What policies of school finance prevail in other nations? Does the level of a country's economic development influence the type of school aid policy employed? What has been the experience of foreign governments which aide private schools? In countries where aid to private schools is a matter of government policy does it tend to be socially divisive? Does such government assistance engender hostitities or hatred?

The taxonomy presented in this paper provides no definitive answers to these questions, however, it does group countries for purposes of comparing school finance practice. It makes possible cross-cultural comparison and it eliminates time and data intensive research on a per country basis. Further, it allows the researcher to begin to formulate hypotheses about relationships between political systems and school finance policies.

[1] Mueller v. Allen 103 S. CT 3062 (1983)

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Description of the Study

In pursuing this research we employed a taxonomic research method. That is, we developed a series of inductively based classifications. In the traditional process of taxonomic research, we began by collecting and examining the data. Ideally, the data itself yields an appropriate number of classifications and suggests a name for each. The classes must be mutually exclusive. Each item must be assigned to the correct class based on its particular characteristics. Taxonomic researchers emphasize that even in the best of taxonomies some data will be difficult to classify.[2] Consequently, taxonomies must contain some element of deductive method reflecting the researchers initial notions of the characteristics being sought.[3]

Data sought in this study were the administrative arrangements and funding sources of some of the educational systems around the world. Descriptive literature from standard sources produced information on seventeen national systems. Relevant portions of the literature, in the form of direct quotations, were identified and excerpted. These descriptions became the raw data of the research. Following careful reading of each description a matrix of similarities and differences was developed.

A second review of literature aimed at determining whether there had been any prior classification of similar data using similar techniques. The researchers found none. Using generally accepted taxonomic research procedure we proceeded to determine an arrangement for grouping data which included all specific cases within the smallest number of classes. Finally, we identified ways in which groups in the emerging taxonomy linked to each other. These linkages became useful in explaining educational policy.

Procedures and Results

After developing the taxonomy, the researchers established a process to determine if it could be empirically verified. This process consisted of: construction of a research instrument, identification of a group of adult readers who had no previous experience with international education and the administration of the taxonomic instrument to the sample.

The instrument provided the reader with the purposes of the study, described the taxonomy and requested that the reader correctly classify each country. Seventeen country descriptions representing five types of school finance organization were presented. The respondents, a community college social science class, were expected to appropriately identify the type of school finance system

[2]Juan E. Mezzich and Herbert Solomon. Taxonomy and Behavioral Science. New York: Academic Press, 1980. p. 7.

[3]Richard L. Derr. Taxonomy of Social Purposes of Public Schools. New York: McKay, 1973.

described in the excerpt. An average 21 responses were reported per country. Some items had to be eliminated for reasons of illegibility. Out of a total 383 responses the final tally revealed 233 agreements or 61% rater agreement. Under a much more conservative inter-rater reliability estimation procedure advocated by Huch, Cormier and Bounds inter-rater agreement dropped to 44%. This figure may have dropped because analysis of individual instruments suggested that two respondents accounted for a large proportion of errors. Also, many of the country descriptions contained lengthy historical references which may have confused the readers. Finally, some excerpts dealt only minimally and indirectly with finance issues. Missing a single word in a passage would have produced an incorrect response. Furthermore, using the Huch, Cormier and Bounds procedure a "don't know" category almost surely would have boosted the reliability coefficient.

After reviewing the responses, the researchers felt that the five classes should be reduced by one in order to meet the criterion of mutually independent classifications. Categories were collapsed into a four alternative model of private school government aid policies. The taxonomy specifies the following government policy options:

Statist - No private education exists. Only state schools are funded.

Separate - Private education is privately funded. Public education receives government funding.

Supportive - Both private and public education are fully government funded.

Syncretic - Private schools receive substantial government funding but are never fully government funded.

Implications, Conclusions and Suggestions for Further Research

The four category model presented in Table I suggests that government school aid policies can be classified with a fairly high degree of accuracy. Examination of countries in each category reveals that no single school aid policy is necessarily associated with any one form of government, level of national economic development, degree of social justice or tradition of religious tolerance with one exception, the Statist category. To totalitarion political systems by definition do not permit the existence of non-state schools.

Separate, Supportive and Syncretic classifications seem to defy easy generalization. Each of these categories contain some high G.N.P. countries. The Separate and Syncretic classes also contain lesser developed countries of the third world. Supportive category countries in this study are all equalitarian northern European democracies, but there are substantial religious differences among them. Belgium is predominantly Roman Catholic with a significant Protestant minority. The predominantly Protestant Netherlands has a substantial

Catholic minority while Sweden has the smallest private school enrollment. All three countries have a history of electing social democratic governments which follow policies of substantial income redistribution.

President Reagan's tax credit proposal and Minnesota's school expense tax deductibility statue suggests that the United States is moving from the Separate to the Syncretic category. Consequently, this category should be of particular interest to school finance analysts. Although there are nations in this group with which many Americans would take political issue, the majority of these Syncretic countries have long established liberal democratic traditions and religiously pluralistic populations. Based on this research we believes that government aid to non-government schools need not lead to religious and social divisiveness. Many of the countries with political and social traditions closest to our own make government aid available so that families can make meaningful school choices.

Countries may evidence similarities in their school finance and administrative systems even though the similarities dervive from quite different evolutionary patterns. This is a distinct limitation of the taxonomy. For example, religious schools may have been a product of colonialism. Government abandonment of funding to private religious schools may partially have resulted from anti-colonial independence movements. Societies with well-established religious traditions (Italy, France) may find the government aid to private schools question contentious and socially divisive. Religiously divided countries may find funding of religious schools highly desirable. Irish Catholics and Protestants don't agree on much but on this issue there is unanimity. On the other hand, the United Kingdom is known for its elite schools, its class system and its old school tie. However, the elite British schools receive no direct government financial aid. Other British schools both public and private are funded on a very egalitarian pattern. From this data it would be difficult to conclude that British governments' school financing patterns support a hereditary class system. Indeed, many of the countries which provide and to non-government schools including religious schools are not conspiculously religious.

The desirability of government aid to private schools remains an open question to which the experiences of foreign societies provide useful insights. This taxonomy allows these interested in school finance to generalize about government aid independently of unique national conditions, events or evolutionary patterns. Based on these funding government, policy on the school aid question cannot be associated with one distinguishable set of social outcomes. Societies which aid religious schools can be religiously tolerant, socially equal or

economically advanced or none of these. Government aid to private schools does not inevitably promote or hinder religious division, social justice or economic development. The issue of aid to non-government schools should be considered on its own merits. Policy decisions should not be made on the basis of assumptions. International experience demonstrates that imagined negative outcomes associated with this issue are not necessarily valid.

TABLE I

Statist	Separate	Supportive	Syncretic
USSR (USGPO - 1974)	Italy (OECD - 1971)	Netherlands (OECD - 1979)	Canada-Ontario (OECD-1979
P.R. China (USGPO - 1972)	Ghana (USGPO - 1976)	Sweden (OECD - 1979)	Israel (SSP - 1969)
	Peru (USGPO - 1980)	Begium (USGPO - 1974)	GFR (Hearnden, 1976)
	Brazil (EDAD - 1980)		South Korea (USGPO - 1982
			United Kingdom (Rogan)
			France (EDAD - 1980)
			Australia (EDAD - 1980)
			Chile (EDAF - 1980)

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